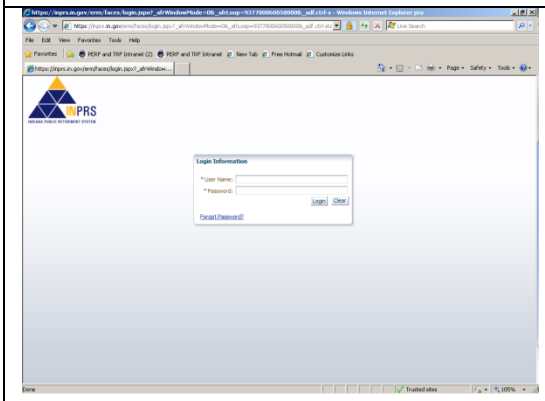
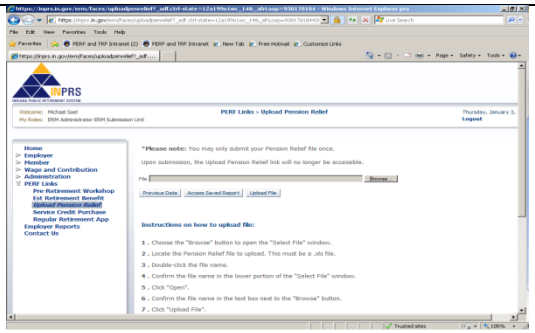
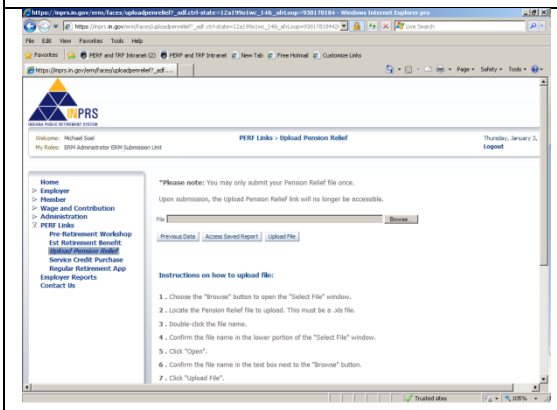
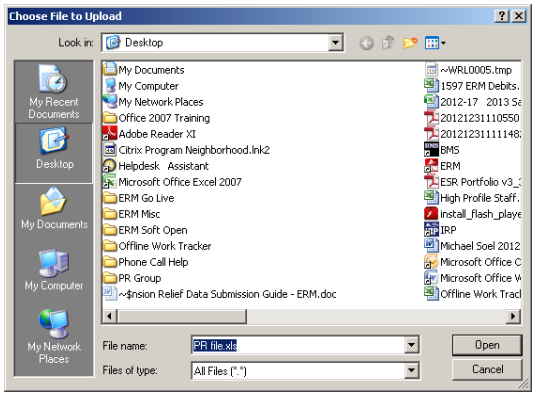
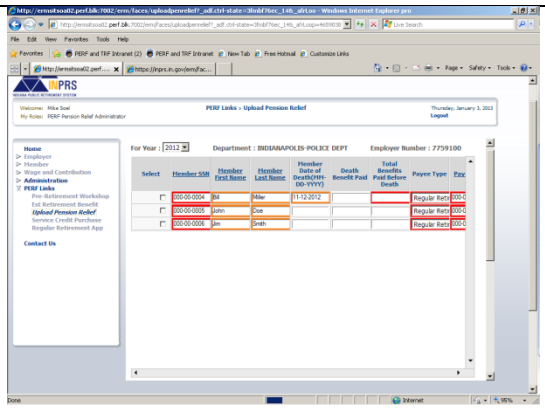
Pension Relief Data Submission Guide	
Effective Date:	12/6/2016
Description:	Instructions For Submitting Pension Relief Data To INPRS Using ERM

Step	Action
1.	If you're not already listed as a user in ERM, your staff ERM security administrator must add you as a user contact in ERM with the security role of 'PERF Pension Relief Administrator' before you can submit the report electronically. If your password has expired since last year, please use the 'Forgot Password' function on the ERM home page or have your staff ERM security administrator generate you a new temporary password.
	If your staff ERM security administrator needs assistance with adding you as a user contact in ERM, they should follow pg. 2 of the 'Getting Started in ERM' guide, available at this link: Getting Started in ERM Guide
2.	**Log into ERM at this link:** ERM Login Page
	
	Log In Help • Use your full email address as your 'User Name' and the temporary password you received via email from the email address 1-inprsnoreply@inprs.in.gov • If your staff security administrator has added you in ERM and you haven't received the emailed password, it may be in your SPAM folder. If you're still unable to locate it in your SPAM folder, please conduct a search in your email box for the aforementioned email address. • If your account becomes locked or disabled, please contact your staff security administrator to unlock your account and generate a new emailed password.

3.	**Navigate to the Pension Relief Upload page**
	• Once you're logged into ERM, look to the ERM menu on the left hand side of screen and click on the arrow next to the menu item labeled 'PERF Links'. In the drop down menu, click on the 'Upload Pension Relief' link, choose the submission unit on the main page and click 'Display Link'.

Step	Action

4.	**Submit Your Pension Relief Data For Validation**
	Please choose one of the two options listed below
 	**Option # 1:** **Upload Pension Relief Excel File** 1. Click the 'Browse' button 2. When the upload window appears, locate and then choose your completed Pension Relief Excel File. Click 'Open' (For '*Blank Excel Template', click here :* *PR Excel Template* *For 'Template Field Level Guide', click here:* *Pension Relief Worksheet Field Level Guide* 3. Click the 'Upload File' button



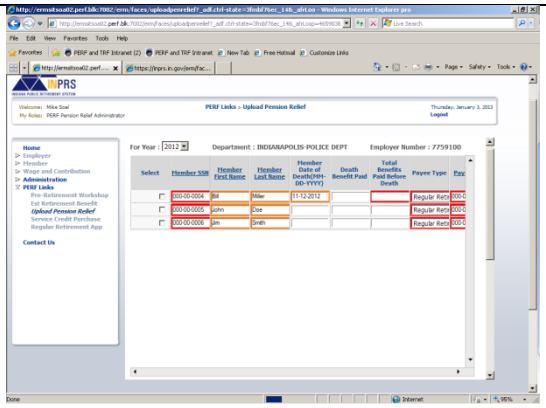
Option # 2:

Update Data Submitted in the Previous Year

1. Click 'Previous Data' button
2. The ERM system will pull up the data your submission unit submitted to INPRS last year.
3. Enter updated information into the appropriate fields

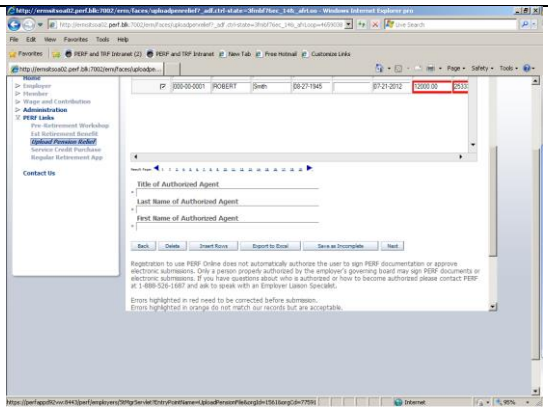
   (ex. Annual benefits, monthly payments, dates of death, survivor information, etc.)

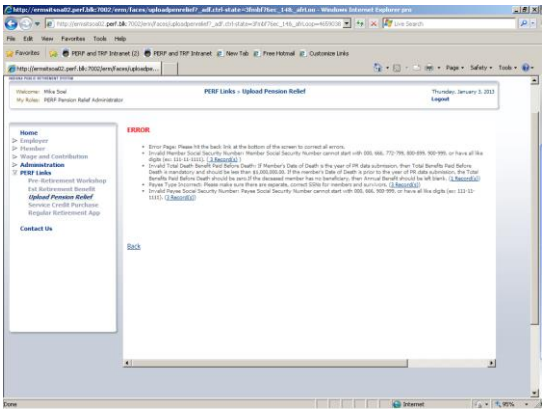
Step	Action
5.	**Correct Any Errors On Your Pension Relief Report**



- Review your Pension Relief information on the form page by using the scroll arrows on the bottom and on the right of the form window.
- Look for the field boxes outlined in red, which contain the errors. You must fix all red-box errors before you can submit your file to INPRS. All entries with red-box errors should sort to the top of the form page.
- For the boxes outlined in **orange** you will receive the following message:

  "Please verify that these flagged records are accurate. They are records where more than one survivor/payee record is connected with a single member's record. Please check for duplication within the group – that the





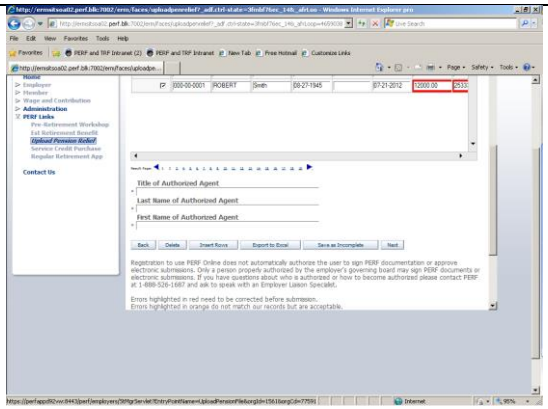
member or survivor/payees are not listed more than once – and that everyone listed is truly connected to this member."

- If your Pension Relief report contains more than 50 retirees, the report will display on multiple web pages. You can move to the next page by clicking the page number links below the form.
- To view the error messages, enter your Authorized Agent information in the three boxes below the form and click 'Next'. Click the link at the end of each error message to identify the retirees that have the errors in their information.
- After reviewing the error messages, click the back link below the messages to return to the form page and make the corrections.
- Please use the document at this link for guidance on how to correct your errors:

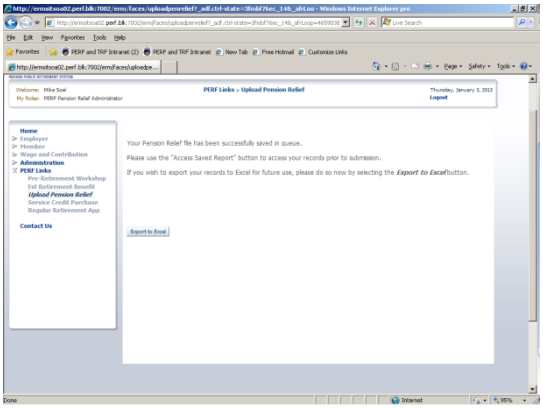
  Pension Relief Worksheet Field Level Guide

  For information on correct formatting of the data, please click the 'View Templates' link from the upload page.

Step	Action
6.	**Saving As Incomplete**



'Save As Incomplete' confirmation page:



- If you would like to save an incomplete report to submit to INPRS at a later time, after first following step # 4 above, enter your Authorized Agent information in the three boxes below the form area and then click the 'Save As Incomplete' button.

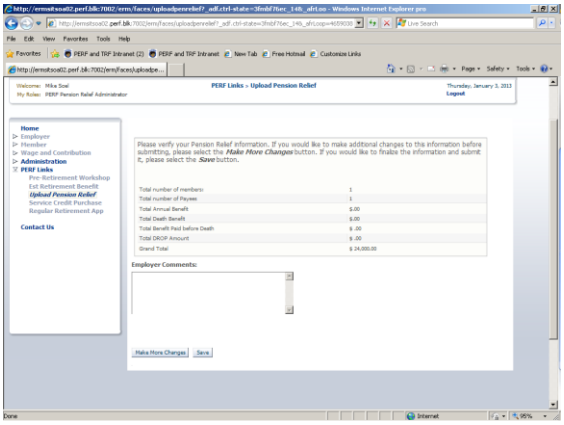
- **PLEASE NOTE: YOUR REPORT WILL NOT SAVE UNTIL YOU HAVE FOLLOWED THESE INSTRUCTIONS AND HAVE RECEIVED THE CONFIRMATION PAGE (pictured left). YOU WILL LOSE ALL YOUR DATA IF YOU FAIL TO FOLLOW THESE INSTRUCTIONS CORRECTLY. AFTER GETTING THE 'SAVE AS INCOMPLETE' CONFIRMATION PAGE, PLEASE CLICK THE 'LOGOUT' LINK ON THE RIGHT SIDE OF THE WEBPAGE. PLEASE DO NOT CLICK THE 'BACK' ARROW AT THE TOP LEFT OF YOUR INTERNET BROWSER, OR THE RED 'X' IN THE UPPER RIGHT HAND CORNER OF YOUR BROWSER.**

- You have the option of exporting an Excel version of your report for your records at this point by clicking the button below the confirmation message. You can also do this while submitting the final version to INPRS after correcting your errors.

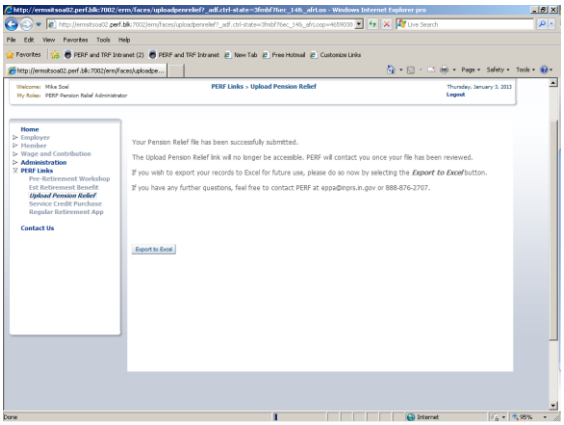
- To re-access your saved report, you must click the 'Upload Pension Relief' link in the ERM menu under 'PERF Links', choose the submission unit on the main page, click 'Display Link', then click the 'Access Saved Report' button. You may then continue fixing the errors and prepare to submit to INPRS.

Step	Action
7.	**Submitting Your Corrected Pension Relief Report to INPRS**

'Totals' Page:



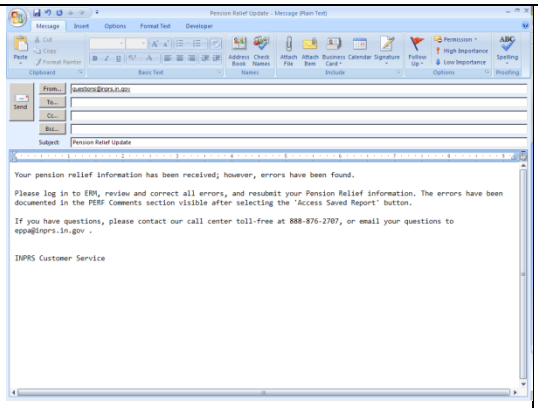
'Success' Page:

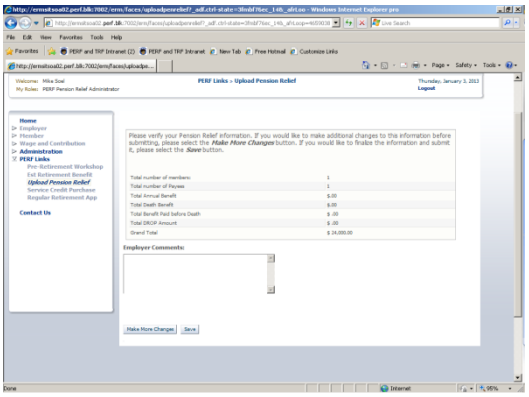


From the success page, you have the option to export an Excel version of your completed report to use next year if you please. Once you leave the success page, you will no longer be able to export to Excel.

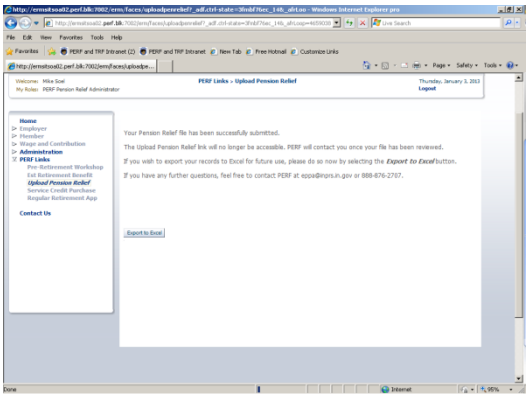
- Once all red-box errors have been corrected, enter your Authorized Agent information in the three boxes below the form and then click the 'Next' button.
- If all errors have been corrected, you will get the 'Totals' page (pictured left). Please review the 'Totals' page to ensure the numbers are correct before submitting to INPRS.
- **Underneath your totals, you may see a list of retirees and / or survivors that were reported in the prior year without a date of death, but are not listed on the current report you're in the process of submitting to INPRS. Please review the list and then follow the on screen instructions to correct, if applicable.**
- At this point, you can either click 'Save' to submit the report to INPRS, or click 'Make More Changes' if you would like to return to the form page and edit the information any further.
- If you choose to click 'Save' and submit the finished report to INPRS, you will receive the success page (pictured left)
- **PLEASE NOTE: THE REPORT IS NOT OFFICIALLY SUBMITTED UNTIL YOU HAVE CLICKED 'SAVE' ON THE 'TOTALS' PAGE AND HAVE RECEIVED THE 'SUCCESS' PAGE. IF THIS IS NOT DONE CORRECTLY, YOU WILL LOSE ALL YOUR DATA IF YOU HAVE NOT PREVIOUSLY 'SAVED AS INCOMPLETE'.**
- **PLEASE NOTE: IN SOME CASES, USERS MAY NEED TO SCROLL THE SCREEN DOWN SLIGHTLY IN ORDER FOR THE 'SAVE' BUTTON TO BE VISIBLE.**

Step	Action
8.	**Handling a Pension Relief Report Rejected By INPRS**





Success Page:



- After successfully submitting your completed Pension Relief report to INPRS using ERM, please monitor your email inbox (and email SPAM folder) of the email account you use to login to ERM. If the report has additional problems, you will receive an email in late January or early February from the email address eppa@inprs.in.gov , requesting you to fix the issues.
- To access your rejected report, you must click the 'Upload Pension Relief' link in the ERM menu under 'PERF Links', choose the submission unit on the main page, click 'Display Link', then click the 'Access Saved Report' button. You may then fix the errors and resubmit to INPRS. You may only have to type an explanation or answer a question posed to you by INPRS staff. You can do this by reading the INPRS staff comments towards the bottom of the form page, clicking the 'Next' button, replying in the 'Employer Comments' box, and then clicking 'Save'. **Be sure you receive the success page (pictured left), or you have not successfully resubmitted.**
- If you have questions or need assistance with Pension Relief reporting, please contact INPRS customer service:

  PH: 888-876-2707
  Email: eppa@inprs.in.gov

  INPRS Pension Secretaries' Online Resource Page: http://www.in.gov/inprs/pensionsecretariesresourcepage.htm

Step	Action
9.	**Pension Relief Distribution Information**

1. In mid June, your organization will receive a letter detailing the amount of your unit's Pension Relief distribution for the year.

2. The total distribution amount is split evenly into two amounts. Each of those amounts is then deposited into the bank account INPRS has on file for your unit. One amount is deposited before July 1st, and the other amount before October 1st. This is all in accordance with Indiana State code.

3. An email notification will be sent out to your staff ERM security administrator a few days prior to each distribution being deposited.

4. If you wish to make a change to your unit's bank account information which INPRS has on file for Pension Relief purposes, please complete and then fax or mail the form at the link below no later than June 1st for your first scheduled deposit and no later than September 1st for the second scheduled deposit.

   Bank Account Information Update Form For Pension Relief

INPRS
PUBLIC EMPLOYEES' RETIREMENT FUND